

## Against the Grain

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# And They Were There: Reports of Meetings -- 28th Annual Charleston Conference

Ramune K. Kubilius

*Northwestern University*, [r-kulilus@northwestern.edu](mailto:r-kulilus@northwestern.edu)

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watching video online through Websites like **YouTube** or **Hulu**. Now, combine that with certain demographic and technological trends relating to young people's experience with creating self-generated video and their burgeoning demand for Internet access; all these are ultimately driving student expectations for faster (campus) networks that are always on and always available.

Expectations for what the library can provide within this context will also rise from instructors and faculty on campus, both those in the classroom and those involved in distance education. As those teaching become more familiar with the technology and what is available (especially newer hires), we may see librarians, instructors and faculty initiating partnerships with different campus departments and other stakeholders to facilitate access to subject-specific streaming video content.

Many academic libraries are already sailing the streaming waters, providing access to music (classical, jazz, etc.) and video (theatre,

opera, etc.) through subscription databases. There are issues relating to content delivery and availability, sound and picture quality, as well as copyright and licensing that will eventually be addressed, but we should expect many more library database vendors as well as other educational and documentary video producers and distributors to get in the game and offer either a selection of video titles for streaming, or collections of streaming video content in the years to come. In the end, academic libraries may wind up with as many different sorts of licensing agreements and arrangements with streaming video content providers as there will be different streaming video formats, platforms and providers from which to choose. There will likely be a continuation of the "access versus ownership" debate with streaming and physical media formats similar to that which occurred in academic libraries with the widespread cancellation of print journal subscriptions in favor of online journals.

Looking back then it can be seen that video format changes for the most part have been gradual. The choice has seldom been "either-or"; for many academic libraries, newer video formats complement older formats, with col-

lections often containing and retaining a mix of analog and digital within them (reel film, video tape, videodisc, etc.). Building relevant, wide-ranging multidisciplinary collections over time to meet the teaching and research needs of the university and providing access to those collections is what academic libraries do, regardless of format.

Lastly, some words to consider from the **Consumer Electronics Association (CEA)**:

*"Manufacturers develop and introduce products to take advantage of new technologies, and not a demonstrable consumer need, and often the profit motive forces the introduction of competing and incompatible formats. History has shown us that any or all of these factors have retarded consumer confidence, delayed purchases and, in some spectacular examples, destroyed both the market for that product and the companies involved."*

"Convergence" from **The Consumer Electronics Association** <http://is.gd/1aAq>.

Just remember, when shooting the rapids, keep your head up and don't stop paddling. 🐻

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## And They Were There — Reports of Meetings

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### 28th Annual Charleston Conference — Issues in Book and Serial Acquisition, "The Best of Times ... The Worst of Times," Francis Marion Hotel, Embassy Suites Historic District, and College of Charleston (Addlestone Library), Charleston, SC, November 5-8, 2008

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Charleston Conference Reports compiled by: **Ramune K. Kubilius** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

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**Column Editor's Note:** *Thank you to all of the conference attendees who volunteered to become reporters, providing highlights of so many conference sessions. In this issue, we are providing the first installment of reports, but there are still more! Watch for them in upcoming ATG issues. Also, visit the Charleston Conference Website for handouts and presentation outlines from many conference sessions. The 2008 Charleston Conference Proceedings will be available in fall 2009. — RKK*

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#### Preconferences — Wednesday, November 5, 2008

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##### **Subscribing to Journals in Community Web Portals —**

Presented by **Simon Inger** (Consultant, Simon Inger Consulting); **Pinar Erzin** (Managing Director, Accucoms)

Reported by: **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

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**Inger** and **Erzin** presented the results of two funded research surveys conducted earlier in 2008. After a review of the routes to journals (also covered in his white paper on the topic, [www.sic.ox14.com/publications.htm](http://www.sic.ox14.com/publications.htm)), **Inger** described the survey's methodology, which admittedly was biased: N. American, European, and life sciences. Comparisons were made (after down-sampling) with a 2005 survey. After an examination of various behaviours, session attendees were introduced to various portal examples, of societies and those presented as narrow subject niche gateways. **Erzin** described the results of a much smaller sample survey of N. American medical librarians, about their familiarity with portals and the content therein. The session was small enough to include dialog

between presenters and attendees, and was particularly lively during the "Implications for Link-Server Management and Authentication" and "Other Issues" portion of the session.

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#### **Negotiating With Vendors: Dos and Don'ts —**

Presented by **Buzzy Basch** (President, Basch Subscriptions); **Janice Lachance** (Chief Executive Director, SLA); **Kim Armstrong** (Assistant Director, Center for Library Initiatives); **Adam Chesler** (Independent Contractor).

Reported by: **Christine Ross** (University of Illinois at Springfield) <cmross1@uis.edu>

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A variety of perspectives were represented in this very informative panel presentation. To begin, an attorney at law shared basic tactics that translate into any negotiating situation. His most useful tips: to determine your opening position prior to entering the negotiation, to anticipate the best alternative outcome, and to make it an integrative negotiation where both parties could realize an additional benefit. Two consortia librarians provided additional useful tips. The best advice for a successful negotiation included: doing "homework" about the product in preparation for negotiation, having another pair of ears on the phone or in the room during negotiations, and knowing, at a minimum, what you want and what you are willing to give up. Finally, the experts shared strategies for lowering prices. These included understanding the true, or market, value of the service or product sought, "trying" out a product at a lower price tier until it's shown that unlimited access is mandated, and offering a price at the outset of negotiation.

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**Morning Plenary Sessions — Thursday, November 6, 2008**

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***Standing in a Company of the Dead: Preserving the Past and Forgetting the Future*** — Presented by **Derek Law** (Head, Information Resources Directory, University of Strathclyde)

Reported by: **Heather Miller** (SUNY Albany)  
<h-miller@uamail.albany.edu>

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**Law** called for “a unified field theory of e-collections,” noting that non-commercial items (archives, ephemera, gray literature) have formed the heart of research collections, but electronic counterparts of these have been largely ignored. The universality of Inter-Library Loan and MARC is a great triumph and model for something similar for e-resources. The exponential growth of e-content (research papers, conference presentations, theses, wikis, blogs, Websites, podcasts, reusable learning objects, research data, images, audio, email, plus many more) begs for attention. Libraries are great repositories that should build digital e-research collections, managing institutional born digital items and adding value to raw content. Libraries could at least provide policy guidance. In response to questions from the audience, he stated that he sees his role as starting the debate, wants libraries to engage the academy, feels that we must engage much earlier in the process than was formerly the case (that is, not waiting for the professor to die in order to obtain his papers), permission to access digital files is an important facet of engaging, we need to decide what is worth keeping (although a questioner felt that we could easily keep everything digital and that access is a more important issue) and feels that printing as a means of preservation is unnecessary.

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***News from the Publishing World*** — Presented by **Pat Schroeder** (President & CEO, Association of American Publishers)

Reported by: **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

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**Schroeder**, a “recovering politician,” with 24 years of experience in Congress, was in a good position to talk about politics and publishing. AAP, the publishers it represents, and authors are now “veterans of a war” (the Google settlement took place shortly before the conference). Publishers with their copyright interests, and the authors in a class action, were parties to a complex “war,” representing many conflicting interests. **Schroeder** took plenary session attendees on a tour of the “win-win” result for the players, the role of rights-holders and the registry. Highlights? The registry is owned by publishers and authors; works not affected are those that are commercially available and in print; a solution is still being sought for orphan works; libraries whose collections were digitized have an archive. More information should be viewed on the Google and AAP Websites. Questions from the audience varied: about the publisher-author site agreement (the contract controls what reverts, what doesn’t), is AAP working towards a standardized eBook reader? (yes), the implications for international books and authors (only U.S.), the role of Copyright Clearance Center (not party to the suit, although CCC may be invited to run the registry. Murmurs were heard in the audience when **Schroeder** announced that photographs and illustrations will be blacked out.

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***Know Logo: Brand, Trust and the Developing Epistemic Infrastructure of Scholarly Communication*** — Presented by **Geoff Bilder** (Director of Strategic Initiatives, CrossRef)

Reported by: **Heather Miller** (SUNY Albany)  
<h-miller@uamail.albany.edu>

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Noting the lack of any means of readily determining trustworthy content on the Internet, **Bilder** suggested that trust filters are needed. Some Internet sites (eBay, Amazon) permit user ratings to indicate the trustworthiness

of the writers, while in Google, links serve as votes. However, these are limited to an individual site and are primitive. He noted that very early in the print era, printers and publishers added clues (e.g., printers’ marks) to indicate value. Comparing the cover of *Nature* with the cover of *Parents Magazine*, one immediately grasps the difference between them. Something that serves a similar purpose is needed for the Internet. While advanced scholars may not need such clues, many others do. This is compounded by the propensity of people not to ask librarians for help and the lack of a truly final version. Other industries have realized the value of metabrands (e.g., organic). He suggested the use of a logo called a “cross mark” (a circle around the letter m) to indicate peer reviewed. Mousing over this logo would reveal links to various value added features. Closing by noting that we are at the early modern Internet and referring to “building digital incunabula,” he made clear how far we have yet to go to make the Internet a truly reliable scholarly resource.

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***I Hear the Train A’ Comin LIVE*** — Presented by **Greg Tananbaum** (Consultant, ScholarNext); **John Sack** (Director HighWire Press, Stanford University); **James Neal** (Vice President for Information Services and University Librarian, Columbia University)

Reported by: **Jonathan Harwell** (Zach S. Henderson Library, Georgia Southern University) <jharwell@georgiasouthern.edu>

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**Tananbaum**, consultant and writer of the *Against the Grain* column by the same title, led this annual series of panel presentations, regarding emerging transformative issues in scholarly communication. His theme, “All I Really Need to Know About Scholarly Communication I Learned in Kindergarten,” focused upon the following ideas:

- **Share everything.** The impact of Web 2.0 has resulted in people sharing information in unfettered ways, with the devices of their choice. The publisher’s challenge is to develop a business model around this desire to share.
- **Play fair.** Some research is mandated to be made available for free in repositories. Many publishers believe this isn’t fair. Authors are caught in the middle, between funding bodies and publishers. We must establish common ground! Use your words; talk it through. Evidence suggests that depositing post-print versions in repositories will provide open access while also preserving the version of record.
- **Don’t take things that aren’t yours.** Do we need better, more simplified FAQ’s on copyright for authors? How do we establish common knowledge about what’s yours and what shouldn’t be taken? We’re dealing not only with articles, but with datasets, files, and informal communication.
- **When you go out into the world, watch out for traffic, hold hands, and stick together.** With Facebook, Twitter, etc., people with shared interests are finding ways to get together. Watch out for the traffic they’re creating.
- **LOOK.** Watch for the unknowns in scholarly communication.

**Neal** spoke about where publishers, librarians, and researchers converge. Defining scholarly communication as the creation, evaluation, distribution, use, and preservation of new knowledge, he pointed out that the economics, technologies, and players are shifting.

Prices are moderated through bargaining, and reader access gains speed and openness. Authors are creatively asserting their rights. However, academic leadership doesn’t yet embrace scholarly communication as a critical policy issue.

**Neal’s** ideas for addressing the issues:

**Idea #1: Maverick scholarship** — With new modes of communication arising, are maverick initiatives being targeted at niche communities via blogs, listservs, etc.? Do university administrators care?

**Idea #2: Asia factor redux** — In the new global economic landscape, where will scholars go? Will prices be artificially propped up, and will western hegemony survive if China and India spark a new wave of publication?

**Idea #3: From Darwinism to capitalism, to socialism: Redefining the role of the university** — As new academic publishers compete with the commercial sector, we bring the means of production back to the academy. This ensures broad distribution of research, and encourages collective action and partnerships among scholarly societies. University

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resources could be reallocated to these new models, but will university administrators and scholars listen?

**Idea #4: Repository chaos and fatigue: Where scholars deposit their work and why** — What versions will survive? Will a new identity registry help? What will be the impact upon scholarly communication?

**Idea #5: HathiTrust and institutional compacts: Where are they taking us?** — HathiTrust is a model for building and supporting an infrastructure for digitized work and scholarly content. As a counterpoint to reliance upon the commercial sector, does HathiTrust (in combination with Portico and CLOCKSS) begin a substantive, trustworthy scholarly archive, with an extended business model for an author-pays strategy?

**Idea #6: Serialization of the extended argument: Monographs in the financial crisis** — [My own concern: What becomes of monographs in libraries, as serial costs continue to inflate during an economic crisis?]

**Idea #7: Integrity and meritocracy do matter.** — Will scholarly communication face new forms of accountability and assessment, and new codes of conduct and compliance? Does the library represent a neutral agency for enforcing and extending integrity? Quality and reputation matter. Does peer review exist anymore? Do we move beyond the impact factor to the Eigenfactor? Do university administrators want new productivity tools to quantify accomplishments? Will the faculty revolt?

**Idea #8: Collective action through sanctioning: Coercive action and moral pressure**

— We've moved to an explosive relationship between publishers and the library community. In a dysfunctional single-source marketplace, do we use coercive action/ sanctions to call publishers and vendors to honor moral values?

Neal's parting words of encouragement: An oak tree takes five years to produce its first acorns. The moral: Sometimes we need to pretend we're something we're not, but we must remain true to our moral values. Librarians and publishers are super people, but we must learn to walk together before we can soar together.

Sack discussed four trends to watch out for. Referring to two recent *New York Times* articles ("Three Trends and a Train Wreck" (<http://www.nytimes.com/2008/10/19/business/19view.html>) and "Hard to Be an Audiophile in an iPod World" (<http://www.nytimes.com/2007/11/25/arts/music/25tomm.html>), these four trends are as follows:

- **Regarding popular culture, "no library or publication is an island."** The term "born digital" is about a generation of people, not documents. Digital natives/millennials (under 45) are effective multitaskers, fluent with media and advertising; expect everything to be shared and transparent; and respect neither copyright nor privacy. The concept of property is different. They also use email less, preferring Facebook, Twitter, etc.

"Lo-fi" is hi-fi enough. Performance quality matters more than high quality. Audiophiles now hook up \$200 iPods to \$30 headphones, instead of using \$10,000 stereos. If it's portable and has a huge library of content, then the sound is "good enough." The culture of "good enough," amateurism, and DIY has people substituting author preprints for pretty PDFs. YouTube might be blotchy, but it works.

- **In the teaching/learning/research culture, the democratization of technology has affected the workflow; but should it direct it?** Popularity is not the most important way of ranking research. Publishers must capture research data, lab notebooks, conference presentations, and university press releases, and connect them to scholarly articles.

People over 40 are comfortable with the written word; younger people are comfortable with audio and video, and expect class lectures in video. Don't treat a/v data as supplementary, but as part of the publication. People are collaborators, rather than readers or browsers. New publishing systems should be people-centric, not paper-centric. Embrace the power of people to control the mechanisms.

- **Regarding online design and technology, articles are media-rich and exist in fragments.** Readers sometimes mistakenly print out a piece of the article. Combined with the decay in research literature [decreasing demand for a given item] of about 20% per year, this results in compound fractures.



- **The publishing process and business shows a trend of "publish now, edit later."** Design innovation is outpacing the standardization of usage measurement, and funding sources are "biodiverse."

## Lively Lunches — Thursday, November 6, 2008

**Acquisitions Disembodied** — Presented by **Jesse Holden**  
(Coordinator of Technical Services, Millersville University)

Reported by: **Jack Montgomery** (Western Kentucky University)  
<jack.montgomery@wku.edu>

Holden began his talk with the statement that we must begin "setting a new conception baseline for Acquisitions" as we try to develop an empirically based model that will synthesize the old practices and ideas with the new types of materials that we are charged with acquiring for our institutions. Until recently, Acquisitions was a liner, "item based process," inherently reactive and focused solely on the physical acquisition of library materials for a localized collection.

Holden believes we must recognize that we have moved to a "post format age" and need to adopt a new proactive stance to the resources we secure in one format or another. These conceptual changes will seem difficult to many because we may harbor fallacies about the materials we are seeking. They include:

**Duality** — we make necessary distinctions based on format which actually does not matter to the idea of acquisitions.

**Ubiquity** — the belief that objects in different formats are interchangeable.

We need to see acquisitions as the center of a spherical information universe. The new paradigm of practice asserts that Acquisitions is actually strategic decision making about collection building and bringing resources into the sphere of the library.

**Lost Girls and Forgotten Realms** — Presented by  
**Clara B. Potter** (Assistant Dean for Technical Services,  
Morehead State University, Morehead, KY)

Reported by: **Linda P. Rousseau** (Charleston Southern  
University) <lrousseau@csuniv.edu>

This "Lively Lunch" session provided an opportunity to hear how other academic librarians are trying to contribute to the whole person of the college or university community by providing recreational reading materials in combination with the academic resources one expects to find in an academic library.

The presenter provided an overview of the collection development and acquisition procedures at her institution. At one point in time, best sellers were maintained as reserves materials which became cumbersome and time consuming due to repair and replacement decisions and processes that were required. The integrated library system reports indicated that the best sellers were most popular among the faculty and staff. Approximately one-fourth of the students checked them out. In addition, often faculty wanted the best seller collection to be cut and the funds applied to journal subscriptions.

The presenter's library started a Recreational Reading Committee in 1997 that included student representation and they engaged a well-known commercial leasing company to provide their titles. They began with a core collection of 400 titles that were housed in a high traffic area of the library. The Committee concluded that there were several advantages to leasing: return torn copies; easy selection of fiction and non-fiction titles; and could purchase titles for \$4.00. The disadvantages to leasing: no cataloging support provided and genres of interest to students were not available.

Highlights of presentation were that creation of a "Student Selection Board" provided good publicity and increased awareness of the leisure reading collection and the establishment of a blog to receive requests by students using Library 2.0 increased student participation. Student leisure reading increased 54% in 2000. And it probably comes as no surprise that data revealed that students like to read what students pick and faculty/staff prefer the titles provided on the leasing plan. There was so much information to share that the session extended over the designated time period.

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**To Supersede or Supplement? Profiling E-book Aggregator Collections vs. Our Print Collections** — Presented by **Jason Price** (Science Librarian, Libraries, Claremont University Consortium); **John McDonald** (Director, Information & Bibliographic Management and Faculty Relations, Libraries, Claremont University Consortium)

Reported by: **Malcolm Q. Walker** (SLIS Student, University of South Carolina, Columbia) <malcolmqwalker@yahoo.com>

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This presentation presented an insight into the effectiveness of eBook aggregators when compared to a library's purchased physical collection. **McDonald** noted that the motivation of this research began with a query on how to conserve space, and continue to support the collection in the future. The strategy to answer this query was to examine the "availability and cost of replicating current purchases patterns in e-format." The aggregators studied were **Netlibrary**, **MyLib**, **Elibrary**, and **EBL**. Data collected came from libraries in the **Claremont University Consortium** as well as other library partners. **Price** presented the data, and concluded that eBook aggregators cannot supersede a physical book purchases. The data showed two things. First, titles in an e-format only represent roughly 25% of book purchases. Second, that the titles listed in aggregators could only be found in one aggregator. Therefore a library would have to subscribe to multiple aggregators in order to represent the print collection. Several questions were asked — but the most interesting dealt with which aggregator was the best. **Price** responded that **Netlibrary** was the richest aggregator — but that it was the least usable.

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**What I Learned at the Reorganization: Lessons Learned While Retooling Technical Services** — Presented by **Rick Anderson** (Associate Director for Scholarly Resources & Collections University of Utah)

Reported by: **Kristine E. Mudrick** (Francis A. Drexel Library, Saint Joseph's University) <kmudrick@sju.edu>

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**Anderson's** first order of business at a new job was to reorganize technical services. Connecting patrons with resources quickly and easily was the foremost goal. He provided a forthright overview of the process he used to develop several options. He also described some of the changes that actually resulted. While this presentation was specific to his university, most points could be generalized and members of the audience were quick to ask questions and enter into discussion. The process **Anderson** used was intended to be as open as possible and he detailed the following aspects: Communication; Interpretation; Resistance; Consensus; Leadership; Management; Morale. Among the tips he shared were recommendations that records be kept — to provide an accurate accounting and to serve as a point of reference for later discussions and decisions — and that these records be placed in a shared space. He reminded the listeners that those in leadership positions are expected to take on difficult responsibilities. While **Anderson** grabbed audience members' attention with his use of the phrase "The staff will change or the staff will change," he described a reorganization process where, when sacrifices will be imposed on others, managers handle the change process kindly, gently, and firmly.

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**Real Life Applications of Usage Statistics** — Presented by **Susan Golden** (Product Manager, Serials Solutions); **Yvette Diven** (Product Manager, Serials Solutions)

Reported by: **Susan L. Kendall** (Dr. Martin Luther King, Jr. Library, San Jose State University) <susan.kendall@sjsu.edu>

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**Golden** and **Diven** facilitated an audience discussion on usage statistics. Participants discussed ways they measured usage of print journals. All

agreed that all of the examples were very labor intensive. With ejournals the audience reported a variety of times that statistics were downloaded, some monthly, some quarterly and some once a semester. Several vendors were present and gave their perspectives on usage statistics.

Participants also discussed best case scenarios of data collection, e.g., adding cost per use; rate of inflation; weight for specific institutions / disciplines. There was a lively discussion on different models of usage statistics collection. A recommended site to investigate is the work by **Joe Zucca** of **University of Pennsylvania**. Also recommended was the listserv "libstats" from the UK — a great service with tips, questions, etc. Many in the audience requested more regional meetings on statistics.

Discussion followed on uses of statistics. Suggestions ranged from establishing priority lists for weeding; informing reference / library instruction; and planning for additional resources.

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**Scholarly Communication and Collection Development Librarians: Getting the Conversation Started** — Presented by **Karen Fischer** (Collections Analysis & Planning Librarian, University of Iowa Libraries)

Reported by: **Cheryl S. McCoy** (University of South Florida) <cmccoy@lib.usf.edu>

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Scholarly Communication is the formal and informal processes through which research results and other scholarly works are evaluated. In her recent article, (Defining and Achieving Success in the Movement to Change Scholarly Communication. *Library Resources & Technical Services*. 2008. 52(2), 44-52), **Joyce Ogburn** discusses the stages of change in the scholarly communication movement:

- 1) Awareness — librarians learn; 2) Understanding — think about establishing a program; 3) Ownership — scholars begin to realize players all share responsibility; 4) Activism — begin publishing endeavors within the library; and 5) Transformation — programs are well engaged.

Collection Development Librarians are beginning to communicate to faculty and need to understand scholarly communication and frame the issues so that their outreach efforts are effective. Scholars need to know that they cannot access all of the content that they want; that some open access journals cost and others do not; and what their rights as an author actually are.

There is a need to collect and disseminate scholarship — mainly through institutional repositories which are the intellectual output of a particular institution. There are many obstacles too — 1) often there is a lack of content; 2) publisher policies are complicated; 3) faculty may have reservations; 4) there are copyright issues; 5) the journal market is changing; and 6) scholars are often uninformed.

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**Consortial Sales: Smoothing Out the Bumps in the Road** — Presented by **Rick Burke** (Executive Director, SCEL C); **Ellen Endres** (Sales Manager North America, Brill); **Linda Wobbe** (Associate Professor, St. Mary's College and SCEL C License Review Committee Chair); **Glenn Johnson-Grau** (Head of Collection Development, Loyola Marymount University)

Reported by: **Ryan Weir** (University Libraries, Murray State University) <ryan.weir@murraystate.edu>

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During this lively lunch representatives of the **Statewide California Electronic Library Consortium (SCEL C)** spoke about the challenges of negotiating consortial agreements. They offered solutions to the challenges faced by both publishers and libraries in the consortial environment. The presenters offered their experiences with negotiating agreements and communicating effectively with negotiation partners. **SCEL C** strives to develop relationships between their publishers and libraries in order to foster an environment of trust and common ground with events, like their annual bowling tournament. **Wobbe** shared **SCEL C's** list of essential elements of any contract which included: Indemnification, Mutual Warranty, Fair Use Rights, and Local Jurisdiction, among others. In a world where libraries need to band together for purchasing power, **SCEL C** is an excellent example of how to do it the right way!

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**eBook Intelligence: The 8th Annual Health Sciences Lively Lunch** — Presented by **Sandra Wenner** (Assistant Director for Content Management, Rush University Medical Center Library); **Pam Harley** (ePublishing Strategy & Product Development, American Psychiatric Publishing, Inc.); **Deborah Ruck** (Information Resources Librarian, Medical College of Wisconsin Libraries); **Meg White, Moderator** (Director Technology Services, Rittenhouse)

Reported by: **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library)  
<r-kubilius@northwestern.edu>

After the introductions of moderator **White** and brief “highlights” of health publishing/library industry trends from the past year (by **ATG** session reporter **Kubilius**), panelist **Harley** revealed some eBook “secrets” from an association publisher’s perspective. Although her organization is “not-for-profit,” the publishing division is expected to turn a profit, maximizing the association’s brand. **APPI** products (their own platform) are designed for individual users, since 92% of the marketing of **APPI** products is to members. Associations also often have to deal with VIP author demands. **Ruck** provided examples of challenges in collection development/management of eBooks: e.g., a publisher requirement that faculty needs to license ancillary materials; bandwidth problems; difficulties with usage statistics and tracking eBook collection usage; different licensing start dates in the “brick by brick” model. She threw out the challenge to advocate for changes and communicate with publishers on what is wanted, needed. Lawyer and librarian **Wenner** provided some cautionary notes about licensing and reminded librarians of their responsibilities — leave yourself time, ask questions, make revisions, read carefully, watch for clause traps (copyright, statute of limitations, etc.). She shared some common misconceptions — you cannot ask for changes/deletions, everything is written in stone, “the vendor won’t like me if I ask for this.” Her conclusion? Contracts don’t kill anyone.

**Just What the Doctor Ordered: A Remedy for Breaches** — Presented by **Mary Ann Mahoney** (Head, Chemistry & Chemical Engineering Library, UC Berkeley); **Margaret Phillips** (Electronic Resources Librarian, University of California, Berkeley)

Reported by: **Miranda Schenkel** (SLIS Student, University of South Carolina, Columbia) <schenkem@mailbox.sc.edu>

**Mahoney and Phillip’s** presentation focused on licensing breaches and suggested best practices for publishers and librarians in the midst of dealing with violations. Because users may not be aware of restrictions on their use of databases, it is important to educate users on access limitations. Data and text mining are becoming more commonplace, as these methods are being used more as the nature of research changes. But how does one compel publishers, vendors, and access providers to view data and text mining as legitimate research? Future contracts may reflect these changes in the “academic use” of information, and perhaps allow a higher threshold for downloading information, as “excessive use” is the most common type of breach.

### **Just What the Doctor Ordered: A Remedy for Breaches**

Second Report by: **Ann Marie Miller** (SLIS Student, University of South Carolina, Columbia) <annmarie.miller@gmail.com>

The speakers discussed scenarios where security was breached, usually accidentally, by searchers looking through online records. They suggested dealing with security breaches by giving users the benefit of the doubt, establishing a high threshold, limiting suspension to the single IP address, not asking for certification of deletion of data, not contacting multiple enforcement sources simultaneously, understanding the changing nature of research, and to not be restrictive out of fear, not to be a policeman, and don’t assume that patrons understand appropriate use.

The speakers took questions, and gave a number of real life examples where users breached the licensing terms by conducting searches that touched a large number of records without knowing that what they were doing was not a proper use of the system. 🐼

*That’s all the reports we have room for in this issue, but we do have more reports from the 2008 Charleston Conference. Watch for them in upcoming issues of **Against the Grain**. You may also visit the **Charleston Conference Website** at [www.katina.info/conference](http://www.katina.info/conference) for additional details.*

## Standards Column — Transforming Metadata

by **Todd Carpenter** (Managing Director, NISO, 1 North Charles Street, Suite 1905, Baltimore, MD 21201; Phone: 301-654-2512; Fax: 410-685-5278) <tcarpenter@niso.org> [www.niso.org](http://www.niso.org)

Metadata is among the most critical requirements of our community. It is the one thing that ties producer to purchaser, acquisition through management and curation, searcher to content, and reader to reference. Each supplier and user of metadata, though, has different needs, different formats, and different priorities for the metadata created and used. It is these subtleties that over time have led to a variety of approaches, a number of community-specific standards, and problems in quality within the chain of information from creator to library and end users.

Today the need to share metadata from different suppliers and creators is greater than ever, if for no other reason than because the creation, distribution, and useful integration of metadata are costly processes. Last year, in part in reaction to the significant costs of catalog record creation, the **Library of Congress** convened a **Working Group on the Future of Bibliographic Control** (<http://www.loc.gov/bibliographic-future/>). That group’s report (<http://www.loc.gov/bibliographic-future/news/lcwg-ontherecord-jan08-final.pdf>) and the **LC**

response (<http://www.loc.gov/bibliographic-future/news/LCWGResponse-Marcum-Final-061008.pdf>) both highlighted the need of the library community to rely more heavily on publisher-supplied metadata to reduce the tremendous costs within the library community of creating catalog records.

There are certainly challenges to this approach of building cataloging. Consider the differences between the **ONIX** data format and the **MARC** cataloging record format, partly due to the dissimilar purposes and uses of **ONIX** and **MARC**. For example, publishers use **ONIX** data to provide forthcoming information to booksellers that could significantly change by the final release of a text, while libraries want their **MARC** data to reflect the final publication. These issues, among many others, make the use of publisher supplied metadata in cataloging fraught with potential problems. Earlier this year, the **Library of Congress** announced a follow-up study to research and describe the marketplace for cataloging records in the **MARC** format to explore the economics of current practices and the incentives and barriers to sharing information.

Publishers, too, are focusing on the exchange of metadata and the costs within the publishing supply chain. The library community is only one recipient of their metadata. During the **Charleston Conference** last year, **Andreas Biedenbach** (<http://www.linkedin.com/pub/dir/andreas/biedenbach>), eProduct Manager Data Systems & Quality at **Springer Science + Business Media** (<http://www.springer-sbm.de/>) described the variety of organizations, to whom his departments distribute metadata — and the many formats that those organizations require. The list was long and the challenges many. It is not surprising that **Springer** has a large team focused on this issue. Likely, many publishers have similar teams invested in addressing the problems of distributing metadata to their community.

In an environment when controlling costs is a high priority for all organizations, the management and sharing of metadata can be an area of significant

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